

Quicken Windows Desktop Import QFX

Backup Quicken Windows Data File & Update.

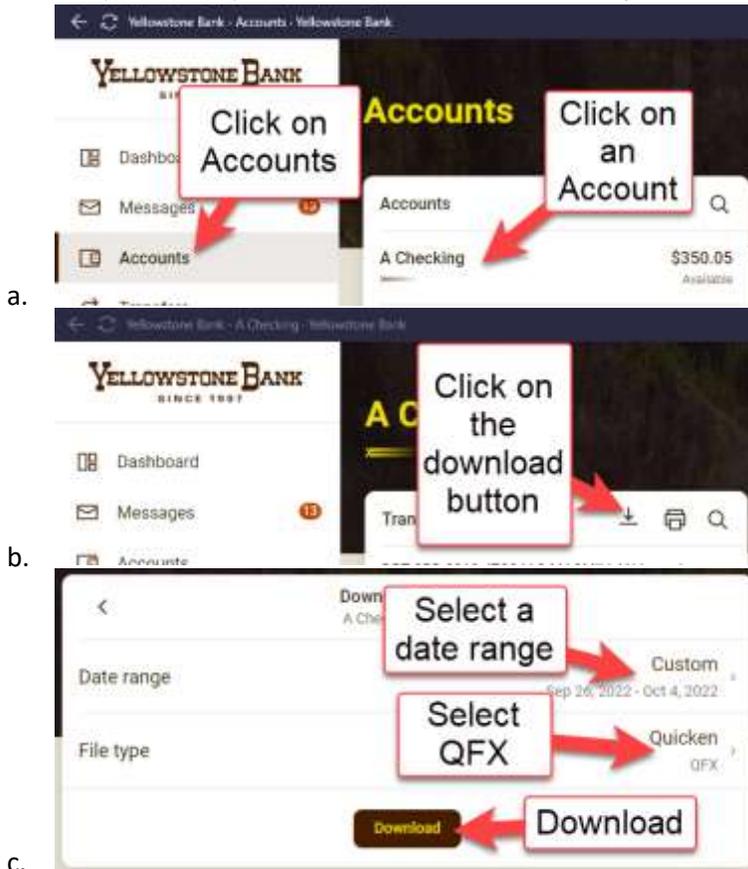
- a) Choose **File > Backup and Restore > Backup Quicken File**.

Deactivate online banking connection for accounts connected to Yellowstone Bank.

- a) Choose **Tools > Account List**.
- b) Click **Edit** on the account to deactivate.
- c) In Account Details, click **Online Services**.
- d) Click **Deactivate**. Follow prompts to confirm deactivation.
- e) Click the **General** tab.
- f) Delete Financial Institution and Account Number information.
- g) Click **OK** to close window.
- h) Repeat steps for any additional accounts.

Reconnect online banking connection for accounts that you deactivated.

- a) Log in to <https://www.yellowstone.bank> and download your transactions to a Quicken Web Connect (QFX) file.



Note: Take note of your last successful download. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.

- b) In Quicken, choose **File > Import > Web Connect (.QFX) File**.
- c) Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
- d) Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
- e) Repeat this step for each account you have connected to Yellowstone Bank.